Optimize Project Performance with Strong PM-BA Collaboration

The PM-BA Alliance: 6 Key Strategies for Project Success

RG

1. Introduction

The two most critical roles at the beginning of a new project are unquestionably the Business Analyst (BA) and the Project Manager (PM). Both play important roles in defining the scope, then cooperate on getting solid requirements that meet the business need and ultimately driving the project forward to completion both on-time and on-budget.

In theory, staffing projects with both a strong BA and PM from the start is not difficult. So why has the Standish Chaos report (among many others) reported huge, systemic problems with a more than 90% failure rate on large IT projects?

The answers may vary from project to project, but two of the most often cited challenges are:

- Requirements poorly understood or specified
- Changing requirements (scope creep)

Who is responsible addressing these challenges? If you reference both the PM Body of Knowledge (PMBOK) and the BA Body of Knowledge (BABOK), you will come away with conflicting answers. And depending on a given organization, its political structure and the specific PM's and BA's backgrounds and personalities, you can find variations all over the board. At best, this role ambiguity can lead to a creative tension that brings out the best of what each PM and BA has to offer. At worst, it can lead to turf wars as each side battles for control.

So, what is the "right" answer? Although it is difficult to generalize given so many variables, it is safe to say that for a project to be successful PMs and BAs must be able to partner effectively as peers. When PMs and BAs come to the table with different notions of "ownership," or "who is responsible for what tasks," or even who needs to be kept in the loop about requirements, risks, or stakeholder conversations, valuable project time is wasted and the ultimate success of the project can be put in jeopardy.

2. Current Culture

If you've ever worked on a large IT project, you've likely seen the following scenario play out before you: Despite working hard to reach quality outcomes that meet the business needs, you continually encounter and must deal with unexpected obstacles, you uncover self-interests that can derail even the best of plans, and you seek relationships within the team that help you rise above the seemingly daily complications.

The best clue to project health could be an examination of the relationship that exists at the beginning of a project between the team's PM and its BA:

- They are supposed to be **on the same team sharing a common goal**, but sometimes they don't quite act that way
- **Each plays a different role with both roles critical for success,** but each may not be aware of this need
- **With different strengths and skills,** each trusts his or her own approach at the exclusion of the other's
- **Holding different perspectives,** they look at their situation differently
- **Communication is problematic**

To reach quality outcomes PMs and BAs must collaborate to rise above the status quo. If they finally combine their efforts, they become far more successful than either one could have been alone. When they work together and acknowledge each

other's strengths—be it begrudged, superficial, or temporary—they come away from a project that is successful.

3. The PM/BA Relationship Conundrum

There is solid evidence that the PM-BA world is dysfunctional. How do we know? In 2010, the Standish Group published a follow up to their famous "Chaos Report" which showed that IT project failures are still the norm rather than the exception (only 16% of software development projects were "successful" in their 2010 survey, the worst result since the first Chaos Report was published back in 1994/1995). And, much the same as in 1994, the key factors causing project failures continue to be poor or missing requirements and changing requirements—the direct responsibilities of the BAs and PMs respectively. More than 15 years after the first Chaos report called attention to these issues, why are we still experiencing the same problems and the same root causes? Let's examine what we know about the relationship between PMs and BAs:

Same Team, Common Goal

PMs and BAs are assigned to work together on projects, but does that mean that they have the same goals? It seems that the BA wants to get the "right" project done, and the PM wants to get the project done "right." In fact, if we take a quick look at some of the key responsibilities, we can see that PMs and BAs interests can diverge quickly.

PMs tend to be very focused upon process. That means:

1. Bringing the project in on time, and making sure tasks meet the project plan schedule

2. Ensuring that the project management methodology is being followed and required document deliverables are produced and milestones reached

3. Ensuring that the budget is managed effectively and not exceeded

BAs, on the other hand, tend to be more focused on **content**. That means:

1. The correct stakeholders have been identified and consulted

2. Requirements are well understood and documented as thoroughly and explicitly as possible

3. The proposed solution fits the organization, and delivers the expected results per the requirements specification

Two Roles, One Success

As the Standish Group survey reveals in detail, 84% of the time (in 2010) the PM and/or the BA got it wrong. So it stands to reason that at the start of an IT project, the PM and BA have the two most critical roles to the overall success of the project—getting the scope and requirements correct (BA), and putting a viable management framework around it (PM). Although their tasks are (for the most part) done separately, together they form the foundation of the project. If either gets their part wrong (especially at the beginning of a project), achieving project success will become an uphill battle that keeps getting steeper as time goes on.

Different Strengths and Skill

We find that both PMs and BAs brings essential skills to a project. PMs tend to be "drivers"—they push, they cajole, they use their powers of persuasion to meet dates and deliverables. But while it's the PM's job to ensure progress, it is the BA who has been hired to assist with the

necessary thinking on behalf of management. BAs need to put a lot of thought into a given project and its business goals and how they affect the organization and their clients. Depending upon how far afield the questions take them, the analysis work may not fit neatly into the expected timeframes. This situation often results in a struggle—the PM wants to make the date, and the BA wants to get the right requirements.

Different Perspectives

BAs spend most of their time with the business people. This gives the BA great perspective on the pain points and opportunities of the current state, and helps motivate them to do a quality job on project requirements. The PM, on the other hand, is usually dealing directly with a different group of stakeholders, namely the Project Sponsor and a Steering Committee. Steering Committees, and the senior folks who populate them, usually want to laser in on metrics that relate to the project's progress. They may not fully understand the project methodology or specific project objectives, but they understand the ultimate business goals especially as they relate to delivering on time and on budget. Each must come to understand what the other needs to accomplish.

Communication is Key

Given that most projects are done under very aggressive time constraints, PMs and BAs often, seem to talk "at each other" rather than "to" each other during the early stages of a project. For example, formal status meetings are usually not the best forum for discussing nuances or sensitive situations that involve project risk. If the PM and BA are not comfortable with each other, the relationship can be reduced to one of indifference, or worse, hostile action (or passive/aggressive inaction). And finally, relationships often come with baggage that is carried over by other associations, projects, and scenarios that can infect an even easy project.

4. Real Change Can Happen

Each project is a pursuit and the prize at the end is a great outcome. In fact, the relationship that the PM and BA forge is so important to the strength of the project and its overall outcome, as well as to future endeavors, that this critical relationship can't be left to chance. In an ideal world, a project PM and BA:

1. Have worked together previously in a constructive manner
2. Share a common understanding of project methodology and the requirements process and critical success factors
3. Consider each other peers (as opposed to a hierarchical leader and subordinate role)
4. Have a deep understanding and appreciation of the other's role and tasks
5. Are comfortable communicating and negotiating with each other based upon mutual respect and trust

Some of these characteristics will be driven by the individuals involved; as everyone knows, you can't force someone to respect another team member. But the bottom line is that the PM and BA need to have a robust relationship that can handle turbulence and disagreement in an open but respectful manner, and then be able to find common ground.

Steps to a better PM-BA relationship

Given what we know about the importance of the relationship between the PM and BA, how can you help forge a successful team? There are six basic strategies you can employ:

1. Train and cross training PMs and BAs on methodology and roles. This way each understands the responsibilities of the other and agrees on how to attain outcomes together.
2. If possible, forge two-person teams of PMs and BAs who can work together more

than once so they can get to know each other's strengths and weaknesses.

3. Cultivate PMs and BAs who exhibit the best characteristics of their respective roles and advocate for them. Reward those who work collaboratively.

4. Chose PMs and BAs who naturally understand the value of compromise and work actively together in managing projects' risks.

5. Pick professionals who over-communicate to ensure that nothing important gets missed. The best PM/BA teams don't assume that the other understands specific project situations or issues.

6. Finally, pay particular attention to the interdependencies between the PM and BA. One of the major strategic areas of overlap between the roles, for example, is the area of scope definition and management. BOTH the PM and BA should be deeply involved in discussions such as this which are deceptively straightforward sounding, but end up playing havoc on schedules and budgets. The PM may think that scope is "settled" early on and that a time and budget estimate can be made and adhered to on that basis; the BA knows that scope can change for very good reasons once a deeper exploration of the problem is underway.

Change toward strong PM-BA relationships is a process. But as individual professionals work together, depend on each other, communicate, and understand each others' roles and responsibilities each project outcome will incrementally improve and it will be the business that is the true winner.

The RG Solution: A PM/BA Alliance

Having been in key requirements management roles on large projects over the last 20 years, RG understands the PM/BA issues firsthand—and we can help.

Our solution is to provide BOTH BAs and PMs that:

- Hold a common understanding of the PM and BA roles and their responsibilities
- Are trained in the same methodology, and use the same 'language' to communicate together
- Are expert in the same tools and techniques
- Have no political turf to protect

Our professionals are trained to work together seamlessly from the inception of the project to provide you the leadership and methodology you need. From initial scope through to the end of the requirements lifecycle, we will document your project's requirements accurately and completely. And then we will follow through with the project management expertise and acumen to deliver your project on time and on budget. Most important of all: RG's highest concern is the success of your project, and our team focus is on producing what's best for your organization.

5. Conclusion

For clients that are looking to either create in-house PM/BA alliances or to improve their existing BA and PM capabilities, RG can also provide the right training, certified by the IIBA, to enhance your employees' skills. Our BAs and PMs can also work alongside your employees as coaches and mentors so that your team can experience our PM/BA Alliance methodology first-hand.

Benefits of the PM/BA Alliance

- **Benefit #1:** Lower the risks and improve the outcomes of your large IT initiatives by providing PM and BA experience and cooperation from the beginning
- **Benefit #2:** Bridge the gap between your IT organization and the business organization, and not waste valuable project time wrangling over who does what
- **Benefit #3:** Bring new best practices and proven techniques to your organization
- **Benefit #4:** Extend your requirements analysis into business processes and help identify opportunities to save your organization money and improve quality
- **Benefit #5:** Provide a quick and cost effective way to get the skills you need when you need them when your organization doesn't have the right people or skills in house